



FBLA Business Financial Plan

Report Rating Sheet

Evaluation Item	Not Demonstrated	Does Not Meet Expectations	Meets Expectations	Exceeds Expectations	Points Earned
Report Content					
Description of business, assumptions, and strategies to obtain loan (one page)	0	1–10	11–20	21–30	
Company Description <ul style="list-style-type: none"> • Legal form of business • Company governance • Company location(s) • Long- and short-term goals 	0	1–7	8–14	15–20	
Operations and Management <ul style="list-style-type: none"> • Business facilities described • Management personnel identified • Workforce described (current and projected) 	0	1–8	9–18	19–25	
Target Market <ul style="list-style-type: none"> • Target market defined (size, growth potential, needs) • Risks and potential adverse results identified, analyzed, and planned for 	0	1–10	11–20	21–30	
Financial Institution <ul style="list-style-type: none"> • Name and type of financial institution to which loan application is being made 	0	1–7	8–14	15–20	
Loan Request <ul style="list-style-type: none"> • Purpose of loan and amount requested • Itemized planned expenditures • Projections for future stability of company 	0	1–10	11–20	21–30	
Supporting Documents <ul style="list-style-type: none"> • Works cited page 	0	1–5	6–10	11–15	
Format					
Clear and concise presentation with logical arrangement of information following the rating sheet categories	0	1–5	6–10	11–15	
Correct grammar, punctuation, spelling, and acceptable business style	0	1–5	6–10	11–15	
Subtotal					/200 max.
Penalty Points Deduct five (5) points each for not adhering to Report Guidelines (maximum of twenty [20] points): <input type="checkbox"/> cover incorrect <input type="checkbox"/> missing table of contents <input type="checkbox"/> binding incorrect <input type="checkbox"/> over fifteen (15) pages <input type="checkbox"/> attached items <input type="checkbox"/> no page numbers <input type="checkbox"/> 2 copies of report not received <input type="checkbox"/> report format does not follow rating sheet					
Total Points					/200 max.

Name(s): _____

School: _____ State: _____

Judge's Signature: _____ Date: _____

Judge's Comments:



FBLA Business Financial Plan

Performance Rating Sheet

☐ Preliminary Round

☐ Final Round

Evaluation Item	Not Demonstrated	Does Not Meet Expectations	Meets Expectations	Exceeds Expectations	Points Earned
Content					
Description of the company, operations, and management (current & projected)	0	1–5	6–10	11–15	
Description of the financial plan and strategies to obtain loan	0	1–5	6–10	11–15	
Underlying assumptions explained and supported	0	1–5	6–10	11–15	
Risks and potential adverse results identified, analyzed, and planned	0	1–5	6–10	11–15	
Purpose of loan and amount requested and projections	0	1–3	4–7	8–10	
Delivery					
Statements are well-organized and clearly stated; appropriate business language used	0	1–3	4–7	8–10	
Demonstrates self-confidence, poise, and good voice projection	0	1–3	4–7	8–10	
Demonstrates the ability to effectively answer questions	0	1–3	4–7	8–10	
Subtotal					/100 max.
Time Penalty Deduct five (5) points for presentation over seven (7) minutes. Time:					
Dress Code Penalty Deduct five (5) points when dress code is not followed.					
Penalty Deduct five (5) points for failure to follow guidelines.					
Total Points					/100 max.
Report Score					/200 max.
Final Score (add total points and report score)					/300 max.

Name(s): _____

School: _____ State: _____

Judge's
Signature: _____ Date: _____

Judge's
Comments: